CASE LISTING MODULE

October 30, 1999
Last Updated April 5, 2001

SWSS Project

USER REQUIREMENTS

Table of Contents

1   INTRODUCTION

1.1   Purpose

The Case Listing serves the function of displaying the caseload and creating access to the cases.

Case Listing offers access to a Summary section for a quick at-a-glance view of a case. All users have access to the Summary.

There are supervisory functions performed for caseload management in Case Listing. This is where the supervisor performs the following actions: accept/assign, withdraw, deny and delete.

1.2   Target Audience

SWSS Development and Implementation staff are utilizing this document to finalize the SWSS application. It will be of use to staff who continue the implementation and SWSS upgrade process.

The following personnel may also be interested:
- SWSS Trainers
- Local Office Security Coordinators
- Local Office ITTs
- FIA Help Desk personnel
- SWSS advance users
- SWSS project staff tasked with developing the User's guide
- CFS Policy staff

2 MODULE NARRATIVE

Currently, there are monthly caseload reports distributed from CIS and CSMIS. The CL-121 and CY-100 are the reports children's services staff and supervisors receive regarding the open/active caseload. These reports only contain information on cases which have been "opened" on CIS, (e.g. CPS transfers, ASSIST registered or new intakes). Workers and supervisors must update these manually or maintain a separate list to have complete information on the actual assigned workload.

There are no "forms", per se, in current use for these case listing reports. CIS and CSMIS are derived from input on the CIS system via the FIA-5S.

3   NAVIGATION FLOW

3.1   Screen Interaction

CL -1.1.1   Case Listing is a Selection from the ID box on the Main Menu. Case Listing can also be
                   accessed from the Sections menu on the tool bar at the top of the screen.

CL -1.1.2   The case listing screen must display a list of cases, for the signed in user (where the user
                   is the primary or secondary worker on the case). For management staff, case listing
                   displays all cases assigned to workers this user supervises plus any of their own
                   "unassigned" cases.

Case Listing shows the worker's case listing of cases that are unregistered, registered,
active and closed. There are option buttons on the screen to select from various Case
Status: Active (Unregistered, Registered and Active), or Closed (Withdrawn and Closed).
Case Listing displays all of a worker's active cases at a time, and all of a supervisor's
workers caseloads in a particular program group.

There are data elements displayed on each case. These categories of data across the
top of the screen are CC (Companion Case), Case Name, Log Number, Primary Worker,
Secondary Worker, County, Program, Status, Status Date, Legal Status and MA status.
The last three elements display when the user scrolls right. The CC Indicator and the
Case Name are static elements that remain locked in view on the screen during this
scroll for the user's reference.

3.2   System Flow

Case Listing is selected from the Main Menu module. It is used to select a case to be
used by all modules that require a log number.

Cases appear in the following order:

1. Program type

   CPS Transfers
   FC/JJ Transfers
   Referred For Adoption
   Disrupted Adoption
   Foster Care
   Adoption
   Juvenile Justice

2. Status

   Referred
   Unregistered
   Registered
   Active

3. Alphabetical by Case Last Name (A-Z)

4. County Code (Numeric)

Also, the aforementioned supervisor actions on Case Listing (Delete, Accept/Assign, Withdraw and Deny) are not available to users who are assigned a security profile of worker and should be inactivated (i.e., grayed out).

After a user views Case Listing, navigation from the screen is by selecting the button that reads "Main Menu."

Decisions were made based on a 9/14/99 meeting and subsequent Bridging group that the "Select Case" Button should say "Main Menu", as that is where selection will flow. At that time it was also determined that Case Number would not be added to case listing because it is an issue of transition from CIS to SWSS.

Per Case Listing Addendum 11 - 16 NOV 2000 the button that was titled "Main Menu" is to be renamed "Select Case". Stop laughing. When the screen was initially designed the button was titled "Main Menu". There's still plenty of time for it to change yet again.

Outstanding issues remain in three areas, as identified by 9/14/99 Meeting notes.

I.   7/29/99 Memo with Major and Minor Changes needed to Case Listing (may take three weeks)
        Major:
        a.) **Locate**-Short term simple solution is available to locate on last name, first only. Long term solution will allow locate to work like GroupWise does.
        b.) **Delete**-Short term fix for all unregistered add new, not converted cases.
        c.) **Sort**- Short term solution, numbers of records issue
        d.) **Sections**- Medium Fix, but doesn't resolve original request-combines fix with lockdown changes recommended.

        Minor:
        Add Legal Status to Case Listing (Done)
        Add Case Number to Case Listing (Not to be done)

II.   **Lock Down changes needed for Case Summary:** (May take 5 weeks)
        Button renovations needed to add buttons re: remove adoption status, cancel, accept, assign, withdraw, and allow sections to be selected from here once a case is selected.

III.   **Framing the buttons**- Short term easily resolved (16 seconds)

4   REQUIREMENTS LIST

The comprehensive (we hope) list of requirements derived from the original requirements, ensuing memos, emails, and test plan documentation.

4.1   Screen, Data, Out-of-Module, Output, Module and Miscellaneous Requirements

The following requirements were derived from the original requirements documents written by policy staff for the SWSS project. Any ensuing memos, emails, or test plans regarding the project were also searched. It is intended to be a comprehensive list of all requirements pertaining to the Case Listing module. Each individual requirement has a unique identifier; the two letter prefix identifies this particular module (CL=Case Listing)

The list is to be used in a Requirements Traceability Matrix, which will be comprised of all the requirements for all the SWSS modules, so that the status of each requirement can be tracked and verified.

CL-2   **SCREEN REQUIREMENTS:**

CL -2.1   A screen must exist for supervisors and clerical workers to specific what they want to see in the list of cases.

CL -2.1.1   A list box containing worker load numbers must exist.

CL -2.1.1.1   For supervisors this list box contains all load number assigned to this supervisor as well as all load numbers the supervisor is responsible for.

CL -2.1.1.2   For clerical workers this list box contains all load numbers that have the same county, district, section and unit as this clerical worker.

CL -2.1.2   A list box containing case statuses must exist.

CL -2.1.3   A list box containing all program codes.

CL -2.1.3.1   For Funding Specialist(CWFS), the list box for Program codes will contain the cases from ADPT, CFC, JJ, and not CPS program codes.

CL -2.1.4   A mechanism must exist for a worker to select a case using soundex.

CL -2.1.5   A screen must exist for Funding Specialists(CWFS) also to specify what they want to see in the list of cases.

CL -2.1.6   For Funding Specialists(CWFS), there will be a mechanism to access CWFS Loads. This mechanism will contain all load numbers within the county districts or counties for which the funding Specialist has responsibility.

CL -2.1.7   For Funding Specialists and their supervisors, there will be a mechanism(Supervisor/CWFS County/District) to choose and select the Load numbers in the respective county/district from the list.

CL -2.1.8   For Unit Support Staff, there will be a mechanism to choose and select the load numbers for a list. This list will be populated by the supervisors' names and load numbers.

CL -2.1.9	Provide ability to disable the option button says, "Specific load" when a CWFS is accessing the screen.
CL -2.1.10	There will be a mechanism for the supervisor to access caseloads of the supervisor for whom s/he has been profiled as the Alternate. This list will be populated by the names and load numbers of staff reporting to the primary supervisor.
CL -2.1.11	There will be a mechanism for the Funding Specialist to access the CWFS Loads to which they have been assigned as the Alternate. This mechanism will contain all load numbers within the county/districts or counties for which the primary Funding Specialist has responsibility.
CL -2.1.12	There will be a mechanism for the Alternate CWFS supervisor to access caseloads of the CWFS supervisor for whom s/he has been profiled as the Alternate. This list will be populated by the names and load numbers of staff reporting to the primary CWFS supervisor.
CL -2.1.13	There will be a mechanism for the Unit Support Staff to access caseloads of the Unit Support Staff for whom s/he has been profiled as the Alternate. This list will be populated by the primary supervisors' names and load numbers.
CL -2.1.14	The load no. in the list boxes will be sorted on the basis of counties and then sorted by alphabetically.
CL -2.2	There must be a "Case Listing" screen
CL -2.2.1	The case listing screen must display a list of cases.
CL -2.2.1.1	For the worker (security level 60) the list contains cases where the person signed in is the primary or secondary worker.
CL -2.2.1.2	For the supervisor (security level 30) the list contains cases based on the criteria selected in the pre-case listing screen.
CL -2.2.1.3	For the clerical worker (security level 90) the list contains cases based on the criteria selected in the pre-case listing screen that are not high profile.
CL -2.2.1.4	The select case must always be highlighted.
CL -2.2.1.5	For the Funding Specialists(CWFS) and their Back Ups / Alternate Funding Specialists, the list on case listing screen will contain cases based on the criteria selected in the pre-case listing screen and that are high profile too.
CL -2.2.1.5.1	There must be an additional colymn on the Case Listing screen named, CONF* that indicates the case has been flagged as confidential or not, the value of the field must be "Y" or Null. Display the meaning of CONF in the lower left hand corner as Confidential Cases.
CL -2.2.1.6	For Non CWFS workers, provide an ability (a button named, "Alternate Case Load") to view their alternates in case listing screen.
CL -2.2.1.7	Provide a mechanism to change the text back to "Return to my Caseload" when Non CWFC worker wants to view their own cases in case listing screen.

CL -2.2.1.8	Provide tooltip when hover around the "Alternate Case Load", "Select to view cases for which you are assigned as an Alternate".
CL -2.2.1.9	
CL -2.2.2	The Case Listing screen must have the following items:
CL -2.2.2.1	Companion indicator
CL -2.2.2.2	Case Name
CL -2.2.2.3	Log number
CL -2.2.2.4	Primary Worker
CL -2.2.2.5	Secondary Worker
CL -2.2.2.6	Current case county (based on Primary worker load #)
CL -2.2.2.7	Program code
CL -2.2.2.8	Case status
CL -2.2.2.9	Case status date
CL -2.2.2.10	Legal status
CL -2.2.2.11	Medicaid status
CL -2.2.3	The case listing screen must allow sorting by any of the data columns returned to and displayed in the case list.
CL -2.2.4	The case listing screen must provide a "locate" mechanism by which to jump to a specified string anywhere in the data returned and displayed in the case list.
CL -2.2.5	There must be a mechanism to display the user's list of closed cases.
CL -2.2.5.1	Funding Specialists will not be allowed to view closed cases.
CL -2.2.6	The Case Listing screen must provide a mechanism to return to the Main Menu without selecting any case information.
CL -2.2.7	The Case Listing screen must provide a mechanism to return to the Main Menu with information on the case selected.
CL -2.2.8	The Case Listing screen must provide a mechanism to display Case Listing case summary of the case selected.
CL -2.2.8.1	Funding Specialist(CWFS) will not be allowed to view Case Summary in Case Listing screen.
CL -2.2.8.2	Provide the ability (Print Button) to Supervisor, CWFS, Non CWFS, Unit Support Staff to print the Case Listing.

CL -2.2.9   The Case Listing screen must provider a mechanism to return to the supervisor selection
                 screen for supervisors.

CL -2.3   There must be a case summary screen.

CL -2.3.1   The case summary screen must display the following data:

CL -2.3.1.1   Case Log #

CL -2.3.1.2   Case Status

CL -2.3.1.3   Last Name

CL -2.3.1.4   First Name

CL -2.3.1.5   Middle Name

CL -2.3.1.6   Case Number

CL -2.3.1.7   Client Id

CL -2.3.1.8   Assigned Worker's Name

CL -2.3.1.9   Open Date

CL -2.3.1.10   Close Date

CL -2.3.1.11   Legal Status

CL -2.3.1.12   DOB

CL -2.3.1.13   Age

CL -2.3.1.14   Sex

CL -2.3.1.15   Handicap

CL -2.3.1.16   Primary Race

CL -2.3.1.17   Language

CL -2.3.1.18   Living Arrangement

CL -2.3.1.19   Placement Name

CL -2.3.1.19.1   Display the name of the family or facility with whom the child is
                    residing.

CL -2.3.1.20   Placement Address

CL -2.3.1.20.1   If the youth's living arrangement is independent living (07), this
                    address is the youth's address (as recorded in the Placement Module).

CL -2.3.1.20.2   For non-independent living cases, display address of the family or
                    facility with whom the child is residing.

CL -2.3.1.21	Placement Date
CL -2.3.2	The case summary screen must show the following data elements for the members in the case:
CL -2.3.2.1	Name
CL -2.3.2.2	DOB
CL -2.3.2.3	Relationship
CL -2.3.3	The case summary screen must have a list of the other companion cases associated with the selected case and the following data elements for the companion's case:
CL -2.3.3.1	Name
CL -2.3.3.2	DOB
CL -2.3.3.3	SSN
CL -2.3.3.4	Client ID
CL -2.3.3.5	Log Id #
CL -2.3.4	The case summary screen must have a mechanism to display case comments.
CL -2.3.5	The case summary screen must have a mechanism to transfer cases from one county to another.
CL -2.3.6	The case summary screen must provide a mechanism to withdraw/delete a case.
CL -2.3.6.1	The withdrawal date for cases that were registered must be displayed and cannot be changed.
CL -2.3.6.2	There must be a mechanism to print an FIA-133a to withdraw the case.
CL -2.3.7	The Case Listing screen must provide a mechanism to deny a case that has been referred to adoption or transferred to another county.
CL -2.3.7.1	The case listing screen must provide a mechanism to enter comments regarding the denial.
CL -2.3.8	The Case Listing screen must provide a mechanism to accept and assign a worker to a case that has been referred to adoption.
CL -2.3.9	There must be a mechanism for the supervisor to mark a case as Confidential.
CL -2.4	**There must be an Accept/Assign screen.**
CL -2.4.1	The Accept/Assign screen will prefill with data after the user selects a load number (primary and/or secondary).
CL -2.4.2	Worker assignment screen must have the following:
CL -2.4.2.1	Primary worker / Foster Care worker's load number.

CL -2.4.2.1.1   Display a list of available load numbers for the user to select from. This list is to include load numbers associated with counties.

CL -2.4.2.2   Case last name.

CL -2.4.2.3   Case first name.

CL -2.4.2.4   Case middle name.

CL -2.4.2.5   Case log number.

CL -2.4.2.6   Case county.

CL -2.4.2.7   Primary worker / Foster Care worker's name.

CL -2.4.2.8   Primary worker / Foster Care worker's address.

CL -2.4.2.9   Primary worker / Foster Care worker's city.

CL -2.4.2.10   Primary worker / Foster Care worker's state.

CL -2.4.2.11   Primary worker / Foster Care worker's zip code.

CL -2.4.2.12   Primary worker / Foster Care worker's phone number.

CL -2.4.2.13   Primary worker / Foster Care worker's county.

CL -2.4.2.14   Secondary worker / Adoption worker's name.

CL -2.4.2.15   Secondary worker / Adoption worker's load number.

CL -2.4.2.15.1   Display a list of available load numbers

CL -2.4.2.16   Secondary worker / Adoption worker's address.

CL -2.4.2.17   Secondary worker / Adoption worker's city.

CL -2.4.2.18   Secondary worker / Adoption worker's state.

CL -2.4.2.19   Secondary worker / Adoption worker's zip code.

CL -2.4.2.20   Secondary worker / Adoption worker's phone number.

CL -2.4.2.21   Secondary worker / Adoption worker's county.

CL-3   DATA EDITING REQUIREMENTS:

CL -3.1   Primary Worker cannot be null on the accept/assign screen.

CL -3.2   There must be a secondary worker (Adoption Worker) on a FC case that has been referred and accepted by the adoption supervisor.

CL-4   OUT-OF-MODULE REQUIREMENTS:

"We Strengthen Individuals and Families Through Mutual Respect and Mutual Responsibility."

CL-5   **MODULE REQUIREMENTS:**

CL -5.1   Assigned cases must show up on a worker's case listing.

CL -5.2   Companion Column and Name Column must remain visible on the case
                 listing screen at all times.

CL -5.3   Cases must appear on case list sorted within their program group in the
                 following order: CPS, FC, ADPT, JJ

CL -5.4   For users (other than supervisors) cases will appear on their list in the
                 following order: Unregistered, Registered and then Active (within a
                 program group).

CL -5.5   For supervisors, cases will appear on their list in the following order:
                 Unassigned , Unregistered, Registered and then Active (within a program
                 group).

CL -5.6   A Foster Care Supervisor's case list must display cases transferred from
                 CPS that are sent specifically to their county, district, unit for any load
                 numbers assigned to them.

CL -5.7   The case listing summary screen must have a mechanism which allows
                 the user to select a case from the list and then navigate to any other
                 module in the application.

CL -5.8   If the worker selects a Case that is UNREGISTERED they must always be
                 taken to the Case Registration Screen.

CL -5.9   A withdrawal process must be provided

CL -5.9.1   The withdrawal function is limited to the primary worker's supervisor only.

CL -5.9.2   When withdrawing registered cases, case listing must generate a Withdrawal FIA-133a
                 and change the case status to "withdrawn".

CL -5.9.3   When a companion case is withdrawn, this action must be performed automatically on all
                 cases in the companion group or the case must be removed from the companion group.

CL -5.9.3.1   Display the message "All companion cases will be withdrawn unless you remove this
                 case from the companion group. Do you want to continue to withdraw all companion
                 cases?" Yes/No

CL -5.9.4   A message will display, notifying supervisor if is client id and case number does not exist
                 for the case(s) being withdrawn.

CL -5.10   A delete process must be provided

CL -5.10.1   The delete function is limited to supervisors only.

CL -5.10.2   Only unregistered, add new cases can be deleted.

CL -5.10.3   When deleting unregistered cases, data must be removed from the system. No outputs
                 are necessary.

CL -5.10.4	When a companion case is deleted , this action must be performed on all cases in the companion group or the case must be removed from the companion group.
CL -5.10.4.1	Display the message "All companion cases will be deleted unless you remove this case from the companion group. Do you want to continue to delete all companion cases?" Yes/No
CL -5.11	A denial process (remove Adoption status) must be provided.
CL -5.11.1	The denial process must allow for denial comments to be entered.
CL -5.11.2	When the case is referred to adoption, the denial process must put the case back to it's originating status and remove the secondary worker.
CL -5.11.3	When the case is transferred to a different county, the denial process must return the case to it's originating status and assign the supervisor of the originating county as the primary worker.
CL -5.11.4	A message must appear based on the case status:
CL -5.11.4.1	Active-assigned (250) or Registered-assigned (275): "Adoption assignment has been removed. Remember to print a 5S."
CL -5.11.4.2	Co/Co Transfer (440): "Case transfer has been denied by receiving county."
CL -5.11.4.3	Active-referred (450) or Registered-referred (475): "Adoption referral has been denied."
CL -5.11.5	When a companion case is denied, the action is be performed on all cases in the companion group unless the user specifies the action is only for this case.
CL -5.11.5.1	Display the message "Do you want to deny all companion cases?" Yes/No
CL -5.11.5.1.1	If the answer is "No", display the message, "Only this case will be denied. You must complete the adoption assignment/denial action individually for each case in the sibling group."
CL -5.12	An accept/assign process must be provided.
CL -5.12.1	When a Referred to Adoption FC case is "accepted" by the Adoption Supervisor, the Adoption Worker selected by the supervisor must be added onto the Foster Care Case as a Secondary Worker.
CL -5.12.2	When a companion case is being accepted or case assignment is being done, the user must be asked if this action is to be performed for all cases in the companion group
CL -5.12.2.1	If the action is not to be performed for all companion case, the user must accept or assign each case individually. However, the cases are NOT to be decompanionated.
CL -5.12.3	When the worker is being changed on a Registered or an Active case, there must be a message reminding the user to generate a FIA-133a.
CL -5.12.4	When the secondary worker is added, changed or removed on an Active, Active-referred or Active assigned case, a message must appear remind the user to generate an FIA-5S.

CL -5.12.5	The secondary worker cannot equal the primary worker unless the legal status is 52 or 90 –94 or the case status is active-assigned or registered assigned.
CL -5.12.6	On a County to County Transfer case, when the supervisor accepts the case, the residence county and district of the case must be changed to match the county and district of the supervisor.
CL -5.13	When the primary worker is changed, there must be a message which pops up saying "The caseworker has changed, do you want to go to report generation and print a FIA-69 ."
CL -5.14	If the user performs an action upon the database after the database has timed the user out, SWSS must automatically reconnect to the database and continue working.
CL -5.15	Central Office users (county 84) need inquiry access for case information.
CL -5.16	Only the supervisor of the primary worker can mark or unmark a case as confidential.
CL -5.17	Only the worker and his/her supervisory chain can modify the confidential case all other users can only see the summary screen.
CL -5.18	When the case is accepted by the Adoption Supervisor, a tickler for the due date of the child evaluation must be generated. The date is 45 days from the commitment date (commitment.commitment_date) if the legal status is "MCI ward" (44, 52 or 94). The date is 45 days from the acceptance date (order_case_person.acceptance_date) entered in legal if the legal status is "Permanent Court Ward" (41, 91 or 93).

CL-6   OUTPUT REQUIREMENTS:

CL -6.1	An FIA-133a must be generated to withdraw a case.

CL-7   MISCELLANEOUS REQUIREMENTS:

5   EXAMPLE OUTPUT

Gather and include the forms and letters generated by this module. If possible, mark up the examples to explain the data fields to show the source or whether or not it is required.

There is no output from Case Listing. It displays on the computer screen and has functionality as described above.

6 DATA ELEMENT DESCRIPTIONS

A table of all the data elements entered within this module. For each item, describe its range of acceptable values. Designate items as being required for ASSIST, CIS, LICENSING or AFCARS (and any combination thereof).

ELEMENT NAME	DESCRIPTION	TYPE - Alpha, numeric, A/N	SIZE	REQUIRED/ OPTIONAL/ CONDITIONAL	CIS/ASSIST AFCARS/ Out Put Document
Only in Supervisory Action are any data elements entered:					
Primary Worker / Foster Care Worker	Cases that are on the bubble between FC and Adoption use Foster Care worker the others use Primary Worker	Numeric	10	Required	ASSIST – FIA 133a
Secondary Worker / Adoption Worker	Cases that are on the bubble between FC and Adoption use Adoption Worker the others use Secondary Worker	Numeric	10	Conditional	CIS – FIA 5s
Withdrawal code	Reason case was withdrawn ** defaults to 500 rjr 1 dec 00	Numeric	3	Required	ASSIST – FIA 133a
Withdrawal date	Date case was withdrawn	Numeric	8	required	ASSIST – FIA 133a

ELEMENT NAME	DESCRIPTION	TYPE - Alpha, numeric, A/N	SIZE	REQUIRED/ OPTIONAL/ CONDITIONAL	CIS/ASSIST AFCARS/ Out Put Document
Supervisor Case Listing Sort function	4 radio buttons	Load # Case Status Program Locate Case	1	Optional	N/A
Under each of the four radio buttons will be the following options:	Load # Pick list of load # 's with current name Then choice of Active or Closed				
	Case Status Pick list of PS Transfer Unregistered Registered Etc.				
	Program Pick list of Foster Care Juvenile Justice Adoption				
	Locate Case Send to Soundex				

7 HELP MESSAGES

There are to be three levels of help available: Screen, which describes how the process for the current module is supposed to work, Context-Sensitive, which describes a particular data field on the screen, and Status Panel, which offer hints about the field or command button with the current focus.

SCREEN (Section or Module level. Offers an entry point to the big help file.)

CONTEXT-SENSITIVE ("F1", aka "detail")

STATUS PANEL MESSAGES (formerly known as "Field Level" and "Baby" before that.)

8 MODULE DEPENDENCIES

The Case Listing Module for cases transferred in from the Children's Protective Services
program, is dependent on information converted in through the Mapper system.
Cases converted in from Mapper and Add New Cases are also dependent on
information entered or converted within other modules. The Case Listing
Module is dependent on information entered or converted into the Legal,
Medicaid, Case Registration, FIA 5s,and Placement modules. Levels of access
and Assign/Accept functions are determined through the Security Module. The
Case Summary Module is accessed through the Case Listing Module.

9 SCENARIOS

The requirements scenarios that call for data entered by this module. This is just a cross reference into the

10 TEST PLANS

The updated test plans written by the Program Office and/or the developer to verify the correctness of the finished application.

11 SOURCE MATERIAL

The following items are included for historical purposes only. The current requirements were derived from this source material, and are, in places, out of date, incorrect, or conflicting.

5.1   Original Requirement

5.2   Memos and E-mails

From: Mary Ann Jensen
To: Nancy PRESOCKI
Date: Wed, Jan 26, 2000 10:53 AM
Subject: Title Change

The Program Office agrees with the change in title/name from "High Profile" to "Confidential" cases.

```
        From:       Mary Ann Jensen
        To:         DSS.BUIS.RIVERAR
        Date:       12/29/98 3:59pm
        Subject:    on point 1 -Reply

        The accept/assign screen should be unaccessable by anyone other than the
        supervisor or someone with a higher level of security clearance.

        >>> Robert Rivera 12/29/98 01:50pm >>>

        Do you want the accept / assign screen unaccessable by anyone other then the
        supervisors or unchangeable by anyone other then the supervisors?

        CC:         KRAKLANC2
```

From: Carol Kraklan
To: DSS.DUIS (riverar)
Subject: disruption question -Reply

The FC supervisor should have some kind of clue that this is a disrupted
adoption case and has not come through CPS transfer. Therefore a different
status for the supervisor to assign the case to a worker. I think once the
worker has the case assigned to him/her the case status can just be
unregistered.

Please let me know if this is not clear.
>>> Robert Rivera 03/02/99 09:08am >>>

When an adoption case disrupts and we return the case to unregistered, you
asked that we specify that it's unregistered from adoption and for the life of
me I can't remember why. Can you re-enlighten me plz?

thx,
Bob

Case listed

```
From:        Paula PALMATIER
To:          DSS2.CFS1(KRAKLANC2)
Date:        4/6/99 8:25am .
Subject:     referred/accepted/assigned cases -Reply -Reply
```

I think it might be useful to the worker. I wasn't sure how to fit it all on
the screen. If this works, sounds good.

>>> Carol Kraklan 04/05/99 12:52pm >>>
I believe we need to show the case statuses the following way:

Registered
Registered-R
Registered-AC
Registered-AS
Active
Active-R
Active-AC
Active-As

This would give the worker the actual case status of either registered or
active and would also give them a clue if the case also had an adoption
secondary status.

I'm not sure this is possible, but just a thought that I had.

>>> Bonnie CORKWELL 04/05/99 08:45am >>>
In the upper right box, do we need to display just the fact that the case is
registered or active but not the referred/accepted/assigned part? Thanks.

Caseliste 3

From: Mary Ann Jensen
To: DSS.BUIS.PRESOCKIN
Date: 6/4/99 4:05pm
Subject: Case Listing

This is to request the following modifications to the Case Listing screen:

1) When scrolling to the right, an "anchor" is needed to hold case name in place on the screen while other case information is being viewed.

2) The columns for Status date and Status should be reversed so that status appears first followed by date.

3) The MA Type column is not needed and should be removed.

4) A Legal Status column is needed and could replace the MA Type column. Only the Legal Status 2 digit code is necessary. It does not have to be translated into the description.

Thanks for your cooperation.

CC: DSS.BUIS.CORKWELLB, KRAKLANC2, LONSBERRYM, DSS.BUI...

caseliste4

```
From:        Mary Ann Jensen
To:          DSS.BUIS.RIVERAR, DSS.BUIS.PRESOCKIN
Date:        7/13/99 2:06pm
Subject:     County adoption supervisor -Reply
```

We believe there is a great potential for there to be several adoption
supervisors in a local office. Wayne could have two (or more) adoption units.
In addition, the local offices which do a lot of foster care purchase will
have foster care monitors (workers) with both fc and adoption security status.
Thus, their supervisors will also have responsibility for both programs.

Please let me know if you need further information. Thanks.

>>> Robert Rivera 07/13/99 12:00pm >>>

There is a change to the county adoption supervisor table with the proposed
security database changes that is very different from the original design.
During initial developement it was explained to me that each county has A
county adoption supervisor and A county adoption supervisor can be resposible
for multiple counties and during the initial design meetings I was sure to ask
if even Wayne was an exception to this rule and I was assured that they were
not. Now the new design has a district column which give the ability for a
county to have multiple supervisors based on meetings that I did not attend.
If this change is needed, we will need to rediscuss the referral process from
foster care to adoption to determine which adoption supervisor will see the
case and how it gets to him/her. I have contact Henry Hofstra about this but
have not had an oppurtunity to follow up on this with him and so far the only
possible exception he could think of is....and don't be surprised....Wayne. I
will continue to research this unless a definite answer is known or there is
great potential that multiple adoption supervisors will be needed in the
county offices.

CC: KRAKLANC2, LONSBERRYM, HOFSTRAH

Caselist e 5

From: Mary Ann Jensen
To: DSS.BUIS.PRESOCKIN
Date: 5/20/99 4:10pm
Subject: Locate Function

This is in follow-up to the 5/11/99 memo on Application Status. Input into the 'locate' function in case listing should be in last name, first name order.

Please let me know if you need additional information (or a memo). Thanks.

CC: DSS.BUIS.LONDONS2, DSS.BUIS.ROCKP, KRAKLANC2, TOME...

From: Mary Ann Jensen
To: HUNSBERGERL, KRAKLANC2, LONSBERRYM, SLOTTKEC, SNYD...
Date: 7/20/99 11:13am
Subject: Case Listing

The issue has been raised that the "ACTIVE" button on case listing is not labeled correctly. The listing obtained through the use of this button actually includes all unregistered, registered and active cases which have been assigned to the unit/worker.

Does anyone have any suggestions for a better label? I've been through the Thesaurus and didn't see anything. The only thing I could come up with was changing the label to "Active/Assigned", but that might cause confusion with the "accept/assign" button.

CC: DSS.BUIS.LONDONS2, TOMESS, DSS.BUIS.RIVERAR

From: Mary Ann Jensen
To: DSS.BUIS.RIVERAR
Date: 7/29/99 10:38am
Subject: Case Listing -Reply -Reply

We like your idea of putting a frame around the Active, Closed and All Cases buttons and title the frame "Cases". We'll leave the names of the buttons are they are. How much of a problem is this to do?

>>> Robert Rivera 07/20/99 11:30am >>>
If I'm not mistaking, there are about a dozen different definitions for acceptance date and commitment date. Perhaps we can leave the button titled as is and put a frame title "Case Load" around those buttons.

>>> Mary Ann Jensen 07/20/99 11:13am >>>
The issue has been raised that the "ACTIVE" button on case listing is not labeled correctly. The listing obtained through the use of this button actually includes all unregistered, registered and active cases which have been assigned to the unit/worker.

Does anyone have any suggestions for a better label? I've been through the Thesaurus and didn't see anything. The only thing I could come up with was changing the label to "Active/Assigned", but that might cause confusion with the "accept/assign" button.

CC: DSS.BUIS.PRESOCKIN, KRAKLANC2, TOMESS

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Nancy Presocki, Manager
SWSS Project

Date: January 8, 1999

CL 1-8

CL 1

From: Mary Ann Jensen, Manager
SWSS Policy

Subject: Case Listing

During SWSS testing it has come to our attention that a user is not able to double click on a case within Case listing to select the case. As this is standard Windows procedure, the policy office would request the Case Listing be changed to allow a user to double click on a case to select the case. The user would then be taken to the Main Menu with the case information prefilled.

We would also request that the button Main Menu on the bottom of the screen be changed to read "Select Case" for those workers who do not choose to double click. If this button is selected and a case is highlighted the worker would be taken to the Main Menu. The Cancel button would function as the non-selection button.

The Review button should also be changed to "Case Summary".

Please contact me if you have any questions. Thank you for your time and attention to this matter.

cc: Sue London
    Sue Tomes
    Bryan Stewart
    Phil Rock
    Carol Kraklan

"We Strengthen Individuals and Families Through Mutual Respect and Mutual Responsibility."

FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Nancy Presocki, Manager
SWSS Development Team

Date: April, 8, 1999

From: Mary Ann Jensen, Manager
SWSS Policy

Subject: Case Listing

It has been noted that a Status Date appears on the Case Listing screen in the 'Add New' situation while the case is in an unregistered status. However, no Status Dates appear for unregistered converted cases or for cases in CPS Transfer.

The conversion date, or the transfer date, should appear in the Status Date on Case Listing. This will allow supervisors and workers to keep track of how long cases have been in a 'pending' status.

Thank you for your assistance.

cc: Sue London
Phil Rock
Carol Kraklan
Sue Tomes

CI 4-8-99

"We Strengthen Individuals and Families Through Mutual Respect and Mutual Responsibility."

FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Nancy Presocki, Manager   Date: April 10, 1998
        ITMS, SWSS Project

From: Mary Ann Jensen, Manager
        Foster Care Funding and Payment Automation

Subject: Case Status

Meetings were recently held to discuss the issue of Case Status. Those in attendance were:

Lee Hunsberger, CPS
Carolyn Snyder, CPS
Carol Kraklan, Foster Care
Melissa Lensbery, Adoption
Kathy Snyder, Delinquency

Case Status would display in the Soundex/Index and in the supervisor/worker case lists. We would like to have Option buttons that allow a worker to choose the type of Case Listing they can view. These buttons would be:

Active-All the Cases where a supervisor/worker can change information
Closed-All Closed cases
All-All of the worker's Case List

Here is the list that we have designed for Case Status. We hope it is all-inclusive but we may have to add more at a later date.

Protective Services Program Module-Active Cases

    Referral
        Referral-Unassigned
        Referral-Assigned for Investigation
        Transfer in-Unassigned Referral

    CPS Cases
        Transferred in-Unassigned CPS Case
        ▴Active-CPS

64

Protective Services Program Module-Closed Cases

Referral
    Withdrawn Referral
    Transfer out to another County
    Transferred to another Agency for Investigation
    Rejected
    Open to CPS
    Linked to Pending or Active Case
    Denied

CPS Cases

    Transferred out-Active CPS Case
    Closed CPS Case
    Expunged CPS Case

Foster Care (FC) Program Module-Active Cases

    Unassigned from CPS
    Unassigned from Disrupted Adoption
    Unassigned from Juvenile Justice (JJ)
    Transferred in-Unassigned
    Unregistered
    Registered
    Active

Foster Care Program Module-Closed Cases

    Withdrawn-Registration FC Case
    Transferred Out Registration-FC Case
    Transferred Out-Active FC Case
    Closed FC Case

Adoption Program

    Referral
    Accepted Referral-Unassigned
    Accepted Referral-Assigned
    (Note: The three above categories are still FC cases as the Adoption worker is added
    as the secondary worker on the FC case once it is assigned.)
    Adoption-Active (Once the child is placed for Adoption)

Adoption Program-Closed

    All Closed Adoption cases are sent to Central Office and will not be assessable to
    workers in the local office.

CI 4-10-98 p 2

Transfer in-Unassigned JJ Case
Unregistered
Registered
Active
Active in Delinquency and Adoption

Juvenile Justice Program Module-Closed

Withdrawn JJ Case
Transferred Out-JJ Case
Closed-JJ Case
Closed to Department of Corrections (DOC)-JJ Case

cc: Lee Hunsberger
   Carolyn Snyder
   Carol Kraklan
   Melissa Lonsbery
   Kathy Snyder
   Shankar Venkataraman
   Mickey Haddick
   Robert Rivera

C 1 4-10-98

66

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FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Nancy Presocki, Manager   Date: April 22, 1999
        ITMS-SWSS

                                                 CL 4-22a

From: Mary Ann Jensen, Manager
        SWSS Policy

Subject: Case Listing

I am requesting that two changes be made to Case Listing. These changes will benefit the workers and are necessary for implementation.

The first change requires that when a CPS supervisor assigns a CPS transfer case to foster care that s/he enters a district and unit designation and that the case transfer to a particular supervisor. The transferred case would only show up on the assigned supervisor's case listing. Currently when a CPS supervisor assigns a transfer case to foster care the case displays on every supervisor's case listing in the county. This requirement was not specifically contained within the Flow specifications. The process in the Mapper system is designed to transfer to a specific designation (unit); therefore it was assumed that the Oracle system would be designed to support this process. This procedure is necessary to ensure rapid assignment of cases being transferred from CPS to foster care. Policy requires that this be done within 5 days of out of home placement. It is imperative that this process be included within SWSS in the first release.

The second change requires a delete process for unregistered cases within SWSS. This requirement was contained in the Flow specifications. The specifications call for an unregistered case to be deleted, while a registered case would be withdrawn. The assumption was that to register a case within SWSS the worker has to generate a FIA-133 for input into ASSIST. Therefore, the worker would need to withdraw the case to generate another FIA-133 to withdraw the case on ASSIST. Currently, the withdraw process within case listing requires a withdraw code and a withdraw date. This is not valid for a delete. Unregistered cases are not recorded within any other FIA database; therefore no input documents need to be generated to update other systems. A possible solution is to label the Withdraw button "Withdraw/Delete". SWSS would know which procedure to call depending upon the case status. As was stated before the only difference for an unregistered case would be that the supervisor would not be required to enter a withdrawal code or date, nor would a 133 need to be generated to update ASSIST.

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questions regarding the above topics. ~~and attention to this matter. Please contact me if you have any~~

cc: Sue London
     Sue Tomes
     Phil Rock
     Danielle Mallon
     Carol Kraklan

CL 4-226

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"We Strengthen Individuals and Families Through Mutual Respect and Mutual Responsibility."

STATE OF MICHIGAN

FAMILY INDEPENDENCE AGENCY

CL 7-29a

MEMORANDUM

CL 3

| To: | Nancy Presocki, Manager | Date: | July 29, 1999 |

SWSS Development Team

From: Mary Ann Jensen, Consultant
SWSS Policy

Subject: Case Listing

This is in response to your request that we identify all changes needed for case listing. This is in follow-up to our meetings on Security and the need to rewrite most of case listing if these security changes are made.

It does not appear that specifications were ever written for case listing since, at the time the requirements packages were developed, the plan was to use the Case Listing already developed in MAPPER. The need to develop these requirements was overlooked when the decision to change platforms was made. However, there are requirements which enhanced the MAPPER Case Listing in the Flow specifications.

The changes fall into two categories: major enhancements and minor adjustments.

Major Enhancements

Locate Function: The locate function in MAPPER allows the user to find a case by inputting name (last, first), log number, or case number. This same functionality should be present in the Foster Care, Juvenile Justice and Adoption applications. If locating by name, as the user begins typing, that part of the list would come up (similar to the way GroupWise works).

Delete Function: A delete process for unregistered cases is needed. See paragraph 3 of the April 22, 1999 memo on Case Listing for details.

Sort Function: User should be able to sort any column (e.g., log number, worker load number, etc.) in Case Listing.

Sections Menu: Allow this menu to be active on the case listing screen. The user could select a name and have the option of going to the desired section immediately bypassing the Main Menu.

Case Listing
July 29, 1999
Page –2–

CL 7-29b

CL 3 B

<u>Minor Adjustments</u>

In going through the various memos and Emails, it appears that most of the minor adjustments have been implemented. The only additional need is two more columns on Case Listing: Legal Status and Case Number.

Thank you for your attention.

cc: Sue London
    Sue Doby
    Phil Rock
    Sue Tomes
    Carol Kraklan

5.2.1 Addendum 3

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: January 24, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Adminstration

Subject: Case Listing Module Documentation - Addendum 3

Based on discussions with development staff and review of Module documentation, it is necessary to amend the November 10, 15 and 22, 1999 memos on the Case Listing Module.

SC-4.9.1 states 'If the current case has been flagged as "high profile" then only the assigned worker or that worker's supervisory chain of command have access to any applicable modules for that case. All other users are restricted to only the "Case Summary" module in order to view the case information.'

UT-3.6 states 'Case Listing REQUIREMENT: provide a mechanism to flag selected cases as "high profile" so that only user's with "high profile" access can view the details of such a case.' However, this requirement was not transferred to the Case Listing Module documentation.

This requirement needs to be transferred to the Case Listing Module along with the following clarifications:

1. Only the supervisor of the primary worker can mark or unmark a case as high profile.
2. Only the worker and his/her supervisory chain can modify the case.
3. Other users can see only the summary screen or soundex results.
4. A section for comments is not required.
5. Flagging the case as high profile will take place on the Case Listing summary screen and will only be accessible/visible by the case supervisors.

Please let me know if you need additional information.

cc: Carol Kraklan
     Sue Doby
     Phil Rock
     Nancy Presocki

5.2.2 Addendum 4

MEMORANDUM

To: Sue London, Director   Date: March 14, 2000
          SWSS Project

From: Mary Ann Jensen, Consultant
            SWSS Policy
            Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 4

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, and January 24, 2000. After discussions with program, project and development staff, it was noted that the following revisions are needed to the SWSS_Case_State list:

1. State 250 must have a – (hyphen) inserted between Active and Assigned.
2. State 350 must have a – (hyphen) inserted between Active and Accepted.
3. State 450 must have a – (hyphen) inserted between Active and Referred. (Note: Change referr**al** to referr**ed**.)
4. State 375 must have a – (hyphen) inserted between Registered and Accepted.
5. State 275 must have a – (hyphen) inserted between Registered and Assigned.
6. State 475 must have a – (hyphen) inserted between Registered and Referred. (Note: Change referr**al** to referr**ed**.)
7. State 430 must be changed to read Rejected **Transfer** (not Xfer).

Please let me know if you need additional information.

cc: Carol Kraklan
     Phil Rock
     Sue Doby
     Nancy Presocki

5.2.3 Addendum 5

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: March 29, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 5

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000 and March 14, 2000. After discussions with program, project and development staff, it was noted that the following revisions are needed to the Supervisor Selection process:

8. Add a new requirement stating "**The supervisor must be able to return to the Supervisor Selection Screen from the previously selected case listing.**" (Currently the process requires that the supervisor go to the Main Menu and then reenter case listing to return to this selection screen.)
9. Add a new requirement stating "**When a specific case status is selected (e.g. registered, active, closed, etc.), the case listing displayed must be for that specific status. There must be a mechanism on the case listing screen to return the user to the Selection Screen for a subsequent selection.**"

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

5.2.4 Addendum 6

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: March 31, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 6

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000 and March 14 and 29, 2000. After discussions with program, project and development staff, it was noted that the following revisions are needed to the Supervisor Selection process:

10. Transfer the Legal Module Requirement LE-4.67 to this module. The requirement states: "**When the case is accepted by the Adoption Supervisor, a tickler for the due date of the child evaluation must be generated. The date is 45 days form the commitment date if the legal status is "MCI ward". The date is 45 days form the acceptance date entered in legal if the legal status is "Permanent Court Ward.**"

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

5.2.5 Addendum 7

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director   Date: June 12, 2000
           SWSS Project

From: Mary Ann Jensen, Consultant
            SWSS Policy
            Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 7

It is necessary to amend the Case Listing Module Documentation memos of November
10, 15 and 22, 1999, January 24, 2000 and March 14, 29 and 31, 2000. After focussed
testing and discussions with development staff, it was noted that the following
clarifications are needed:

1. CL-4.3 must be modified to state "...... following order: CPS **Transfer,
   FC/JJ Transfer, Co/Co Transfer, Referred for Adoption, Disrupted
   Adoption,** FC, ADOPT,...."
2. CL-4.4 must be modified to state "..... following order: **Referred,**
   Unregistered ...."
3. A new requirement is needed: CL-4.9.x   The withdrawal Code must
   be shown as "500-Administrative Withdrawal/Correction".

Please let me know if you need additional information.

cc: Carol Kraklan
     Phil Rock
     Sue Doby
     Nancy Presocki

5.2.6 Addendum 8

S T A T E   O F   M I C H I G A N
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: June 21, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 8

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000 and June 12, 2000. After focussed testing and discussions with development staff, it was noted that the following clarifications are needed:

A. The worker load number list in Case Listing (Accept/Assign) does not agree with the worker load number list in Case Registration. This means that the case may be accepted/assigned to a worker in Case Listing and that worker could not be entered and would not be reflected in Case Registration. (SER #493) The following requirements are needed:

   4. Add CL-4.? "Assigned worker choices should be limited to thoese load numbers that handle the program group for the case."
   5. Add CL-4.?.1 "If the user is logged on with worker security status, the assigned worker choices must include his/her own load numbers associated with the login name."
   6. Add CL-4.?.2 "If the user is logged on with clerical security status, the assigned worker choices must include all worker status load numbers assigned to the supervisory unit."
   7. Add CL-4.?.3 "If the user is logged on with supervisor status, the assigned worker choices must include his/her own load numbers associated with the login name, the load numbers of all subordinates and the load numbers of all supervisors in the county."

8. Add CL-4.?.4 "The list of available load numbers for secondary worker assignment must only include the county identifiers (first two digits of number) in the range of 01 through 83."
9. Add CL-4.?.5 "The secondary worker cannot equal the primary worker unless the legal status is 90-94."

B. When a case is transferred or assigned to a new load number, the ticklers associated with that case do not transfer but rather remain on the previous load number. (SER #490) The following requirement is needed:

Case Listing Addendum 8
June 21, 2000
Page –2-

1. CL-4.12.3.? "When a case is transferred or assigned to a new load number, the ticklers associated with that case must be transferred to the new load number and removed from the previous load number.

Please let me know if you need additional information.

cc: Carol Kraklan
      Phil Rock
      Sue Doby
      Nancy Presocki

5.2.7 Addendum 9

STATE OF MICHIGAN

FAMILY INDEPENDENCE AGENCY

<table>
<tr><td colspan="3" align="center">**MEMORANDUM**</td></tr>
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To: Sue London, Director   Date: July 20, 2000
SWSS Project

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 9

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000 and June 12 and 21, 2000. After focussed testing (SER #535) and discussions with development staff, it was noted that the following clarifications are needed:

CL-1.2.7 must be deleted. (There is not a method of accepting a case without assigning it to a staff member.)
CL-1.2.8 must be modified to state "......a mechanism to **accept a case and** assign **a** worker ~~to a case~~.

Please let me know if you need additional information.

cc: Carol Kraklan
     Phil Rock
     Sue Doby
     Nancy Presocki

S T A T E   O F   M I C H I G A N

FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: July 27, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 10

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000 and July 20, 2000. After focussed testing (SER #536) and discussions with development staff, it was noted that the following clarifications are needed:

Add a new requirement: CL-4.?.2.1 "The supervisor Selection Screen must be displayed to provide the clerical user access to the unit's cases." (See Case Listing Module Documentation Addendum 8, #3.)

Please let me know if you need additional information.

cc: Carol Kraklan
     Phil Rock
     Sue Doby
     Nancy Presocki

5.2.9 Addendum 11

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director   Date: November 16, 2000
SWSS Project

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 11

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000 and July 20 and 27, 2000. After focussed testing (SER #'s 1757, 1837, 1844, 1845, 1974, 2402, and 2493) and discussions with development staff, it was noted that the following clarifications are needed:

1. Add a new requirement to CL-1.3.6 If the user attempts to withdraw a case which has no Client ID and/or case number, a message must display stating "The Client ID/case number (i.e., the missing value(s)) must be entered in the Child Information Section before the case can be withdrawn."
2. Add a new requirement to CL-4.12.3 If a secondary worker is added, changed or removed on an Active, Active-Referred or Active-Assigned case, a message must appear reminding the user to generate an FIA-5S.
3. CL-4.12.4 must be modified to state "….legal status is **52**, 90-94….."
4. Add a new requirement to CL-4.11 One of the following messages must be displayed depending on the case state:
    Active-Assigned or Registered-Assigned: "Adoption assignment has been removed."
    Co/Co Transfer: "Case transfer to _____ county has been denied by that county."
    Active-Referred or Registered-Referred: "Adoption referral has been denied."
5. Add a new requirement to CL-1.2 The Case Listing Screen must continually highlight the case which will be selected if the Main Menu (name to be changed to Select Case) button is chosen.
6.   On the Case Listing screen, change the title on the Main Menu button to "Select Case'.

7. Add a new requirement to CL-4.12.2 All the cases in the companion group must be either registered or active.

8. Add a sub-requirement to #7 above: If the user is assigning a child of a companion group to an adoption worker and there is an unregistered case in the companion group, a message must display stating "The case for _____ (name of case(s)) has not been registered. You can not assign this companion group to an adoption worker until this case is registered."

Case Listing Addendum 11
November 16, 2000
Page –2-

9. Add a sub-requirement to #7 above: If the user is assigning a child of a companion group to an adoption worker and there is a case(s) in the companion group which has not been referred, a message must display stating "The case for _____ (name of case(s)) has not been referred to adoption. You can not assign this companion group to an adoption worker until this case is referred."

Please let me know if you need additional information.

cc: Carol Kraklan
     Sue Doby
      Beth Dean

5.2.10   Addendum 12

S T A T E   O F   M I C H I G A N
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director   Date: December 21, 2000
            SWSS Project

From: Mary Ann Jensen, Consultant
            SWSS Policy
            Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 12

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000, July 20 and 27, 2000 and November 16, 2000. After discussions with development staff, it was noted that the following clarification is needed:

10. Add a new requirement to CL-1.3.6 If the user attempts to withdraw a registered case which has information entered in the Placement Module and/or the Education Module, Case Listing must insert the withdrawal date as the Placement End and/or School Attended To date.
11. Add a new requirement to CL-1.3.6 If the user attempts to withdraw a case for which Medicaid is registered or active, a message must appear advising the user that Medicaid must be withdrawn/closed before the Service case is withdrawn.

Note: This change is not required for the go/no go decision on the Kalamazoo pilot. It is needed before Statewide implementation begins.

Please let me know if you need additional information.

cc: Carol Kraklan
     Sue Doby
     Beth Dean

5.2.11   Addendum 13

S T A T E   O F   M I C H I G A N
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director   **Date:**   February 23, 2001
SWSS Project

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 13

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000, July 20 and 27, 2000, November 16, 2000 and December 21, 2000. Review of the Documentation requirements and discussions with development staff have identified the need to move out-of-module requirements into the appropriate module.

12. Add a requirement similar to UT-3.6: Provide a mechanism to flag a selected case as 'confidential'.
13. Add a requirement similar to PX-3.1.4.1: Cases transferred from CPS to SWSS FC must be included in the (CPS designated) foster care supervisor's case listing.
14. Add a requirement similar to PX-3.1.4.2: Case listing must recognize the county number in the load numbers assigned to a user in order to find all transferred cases that should display in their list of cases.
15. Add a requirement similar to MM-3.2.1: When the user returns to the Main Menu, the Log # field will be prefilled if the user selected a case.   If there is a case number associated with the case, the case # field will be prefilled.
16. CL-3.1 and CL-3.2 can be deleted. These are contained in the Comments Module.

Please let me know if you need additional information.

cc: Carol Kraklan
Sue Doby
Beth Dean

5.2.12   Addendum 14

STATE OF MICHIGAN

FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: March 19, 2002

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 14

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000, July 20 and 27, 2000, November 16, 2000, December 21, 2000 and February 23, 2001. After SER #4657 was logged and discussions with development staff, it was noted that the following clarification is needed:

17. Add a sub-requirement to CL-1.3.1.20:   If the youth's living arrangement is independent living (07), this address is the youth's address (as recorded in the Placement Module).

Please let me know if you need additional information.

cc: Carol Kraklan
     Sue Doby
     Beth Dean
     Vicki Weller

"We Strengthen Individuals and Families Through Mutual Respect and Mutual Responsibility."

5.2.13 Addendum 15

S T A T E O F M I C H I G A N
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Beth Dean, Manager
Services Area
ITMS

Date: August 12, 2002

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 15

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000, July 20 and 27, 2000, November 16, 2000, December 21, 2000, February 23, 2001 and March 19, 2002. After SER #4022 was logged and discussions with development staff, it was noted that the following clarification is needed:

18. Add a new requirement: On a County to County Transfer case, the residence county and district must be changed to the appropriate transfer in county and district information.. This would occur when the supervisor accepts the transfer.

Please let me know if you need additional information.

cc: Pat Wilson
Sue Tomes
Vicki Weller

5.2.14   Addendum 16

FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Beth Dean, Manager   Date: August 14, 2002
Services Area
ITMS

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 16

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000, July 20 and 27, 2000, November 16, 2000, December 21, 2000, February 23, 2001, March 19, 2002 and August 12, 2002. After SER #4906 was logged and discussions with development staff, it was noted that the following clarification is needed:

19. CL-1.3.6.1 must be modified to state: ~~There must be a place to enter a~~ **The** withdrawal date for cases that were registered **must be displayed as the current date and cannot be changed**.
20. CL-2.1 must be deleted.

Please let me know if you need additional information.

cc: Pat Wilson
Sue Tomes
Vicki Weller

5.2.15   Addendum 17

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Daniel Klodt, Manager   Date: January 10, 2003
        Services Area
         ITMS

From: Mary Ann Jensen, Consultant
          SWSS Policy
          Child and Family Services Administration

Subject: Case Listing Module Documentation - Addendum 17

It is necessary to amend the Case Listing Module Documentation memos of November 10, 15 and 22, 1999, January 24, 2000, March 14, 29 and 31, 2000, June 12 and 21, 2000, July 20 and 27, 2000, November 16, 2000, December 21, 2000, February 23, 2001, March 19, 2002 and August 12 and 14, 2002. After SER #'s 4767 and 4904 were logged and discussions with development staff, it was noted that the following clarifications are needed:

21. Add a sub-requirement to CL-1.3.1.19: This is the name of the family or facility with whom the child is residing, not the placing agency name. (SER #4767)
22. Add a sub-requirement to CL-1.3.1.20: This is the address of the family or facility with whom the child is residing, not the placing agency address. (SER #4767)
23. CL-4.9.1 must be modified to state: "The withdrawal function is limited to **the primary worker's** supervisors only." (SER #4904)

Please let me know if you need additional information.

cc: Pat Wilson
     Sue Tomes
     Vicki Weller

6 TEST PLANS

6.1 Test Plan Created by Policy

6.1.1 Case Listing

- Unregistered Cases display on the List first, with Registered and Active displaying thereafter.
- A button should be available for the worker to select to see a listing of their Closed Cases.
- A Supervisor's Case Listing will also have an Unassigned Status. Unassigned Cases should display at the top of the Supervisor's Case Listing.
- A new Log # will **not** be generated when a Case goes from having an Unregistered to a Registered Status or a Registered Status to an Active Status.
- Only a supervisor will be able to withdraw a registered case (**Edit**).
- When the supervisor is assigning a case to a worker, s/he will only be able to assign the case to a worker that s/he supervises. A secondary worker can be anyone in the State (**Edit**).

6.2 Test Plan Created by SWSS Development

12 OUTSTANDING ISSUES

The following items require a decision or some direction from Policy staff:

    1

Attachment A: List of SWSS Module Prefixes